

Welcome to the IBM Sales Collateral Guidelines v2.0

Sales collateral plays a critical role in the IBM worldwide communications mix. The new Global Brand & Design Principles have been created to aid in the development of sales collateral and to ensure the highest level of consistency across divisions and around the world – *one company, one voice*.

The principles you will find in this guide are the result of an ongoing dialog with IBM customers, collateral agencies and the IBM collateral community. They are ultimately geared toward achieving a singular and very important goal: creating meaningful collateral materials that leverage the power of the IBM Brand and deliver rich content to our customers.

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Part 1

Brand Principles

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1.1 Introduction

Who is this guide for?
What will you find in this guide?

IBM Sales Collateral Global Brand & Design Principles

Introduction

Who is this guide for?

This guide is created for collateral agencies and IBM personnel who are responsible for collateral development within each business unit.

This guide is primarily intended for the creative teams at IBM certified collateral agencies and IBM personnel who are responsible for creating, producing, distributing or evaluating sales collateral for IBM.

What will you find in this guide?

Inside, you'll find a complete creative toolbox that addresses virtually every aspect of the creative development process for sales collateral. Some sections are more general and descriptive – like those about tone, manner and imagery. Others are very specific and definitive – like the sections on logo usage, typography and layout style sheets.

We have made every effort to design this guide with the user in mind. It includes simple, easy-to-follow directions, instructions and explanations. You'll also find a collateral creative brief, layout style sheets and production guidelines.



Sales collateral definition

What is sales collateral?

Sales collateral versus direct marketing

Sales collateral definition

What is sales collateral?

Sales collateral is marketing and sales support material that is contentfocused, information-rich and designed for use across multiple specialties.

This flexibility with regard to usage is one of the main characteristics of collateral. An advertisement or a direct marketing campaign is designed for one specific purpose and expires quickly. A collateral brochure has a longer shelf life and often needs to work as sales support, hand-delivered or sent by a sales representative or business partner, as fulfillment for an advertising or direct marketing campaign, or as a handout at a trade show or an IBM event.

How does collateral differ from direct marketing?

Although there are certain overlaps between direct marketing and collateral materials, they usually perform distinctly different roles.

While the direct marketing objective is to generate a response from customers, collateral delivers the information your customer needs to determine whether or not to consider IBM. Direct marketing materials are usually designed to generate demand and are unsolicited. Sales collateral materials are designed to fulfill a customer need and supply required information. Therefore, direct marketing deliverables need to have the highest possible impact; collateral materials need to have the richest and most relevant content.

The following collateral design principles have been established with these distinctions in mind.

Direct marketing deliverables need to have the highest possible impact; collateral materials need to have the richest possible content inside.

Direct marketing materials are usually designed to generate demand and are unsolicited.

Sales collateral materials are designed to fulfill a customer need and are solicited.



1.3 Understanding the customer

Putting customers' needs first
Giving customers what they ask for

Understanding the customer

Putting customers' needs first

No matter what type of collateral you plan to develop — always start with your customers in mind. Who are they? What role do they play in the purchasing cycle? What type of information would they require to make a purchase decision? The better you address your customers' specific interests, the more successful your collateral will be.

Giving customers what they are asking for

Extensive research among IBM customers, prospects, marketing reps and business partners around the world has established three principal audience sets for sales collateral: **Business Strategists, Line-of-Business Managers (or Department Heads) and IT Managers.** Based on their specific roles in the purchasing cycle, each group has different information needs that collateral can fulfill.

Certain formats work better for certain targets.

There is a range of formats collateral can have.

Business Strategists are usually involved at the very beginning or end of the purchasing process. They are interested in business benefits and "proof points" and prefer to get condensed, high-level information that is not technical in nature. The materials created for this target should demonstrate IBM thought leadership. *Overview brochures, business issue-oriented brochures,* and *white papers* work best for this group.

Line-of-Business Managers are primarily involved in software solution purchases, rarely in a hardware buy. If they are involved, they are engaged at the beginning or end of the purchasing cycle. These customers are interested in industry-specific applications (*specification sheets*) and *case studies*.

IT Managers are critical during the evaluation phase of a product or solution. They want "speeds and feeds" – content-rich, technical information that focuses on facts. *Product brochures, reference guides* and *specification sheets* are the preferred deliverables for this group and should be specifically targeted at them.



Integration – staying true to the IBM Brand

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1.**4**

IBM Sales Collateral Global Brand & Design Principles

Integration – staying true to the IBM Brand

What is a brand?

Protecting a brand is a matter of protecting past investments in it, as well as a way of assuring its future success. A brand is more than a company name and logo. It is a set of attributes that differentiate one company's offerings from its competitors' in the minds of customers. It is what people think and feel about what a company, product or service mean.

Companies make products, but customers buy the promise of a brand.

The IBM Brand

While advertising may be overlooked, or direct marketing discarded, sales collateral, by nature, is more likely to reside in the hands" of the customer. The IBM Brand is our company's most valuable asset. It is one of the most powerful and recognizable brands in the world. Everything our company says and does represents the IBM Brand. That's why every person involved in marketing communications for IBM needs to be aware of the importance and value of our brand. Whether you work in the area of collateral, advertising, direct marketing or interactive communications – always manage the IBM Brand with care. And be sure that every communication works to strengthen it.

Well-branded collateral material assists in the creation, building, maintaining and energizing of a profitable brand.

IBM Sales Collateral Global Brand & Design Principles

Integration – staying true to the IBM Brand

The Brand Intent

The Brand Intent is the aspiration of IBM-what we want our customer to experience and, in turn, think and feel about IBM. It is the foundation for all of our company's communications and actions.

The Brand Intent is the aspiration of IBM – what we want our customer to experience and, in turn, think and feel about IBM.

The IBM Brand Intent is built on a framework that starts with customer beliefs and perceptions about the tangible, functional benefits, "performance associations," and the intangible, symbolic benefits the brand possesses and conveys, "personality associations."

For more information on the IBM Brand Intent visit www.ibm.com/ marketing/branding

IBM Performance Associations:

Knows business and technology – anticipates and advances "what's next" for business

Insightful and experienced people, expert at finding opportunities and solving problems

Nimble and relevant technology

Rapidly leverages breadth and depth of resources

Easy to do business with

IBM Personality Associations:

Imaginative thinker

Energetic and results-oriented

Strong integrity

Sense of humor

Great listener

Inspiring

The Brand Nucleus

At the center is the Brand Nucleus, which is the fundamental core of a brand that links together and underlies any of the brand associations. It is a concept or metaphor that gives the brand integrity by ensuring all marketing activities and organizational systems are in alignment.

IBM Brand Nucleus: Imagination for Business Advantage

Note: The Brand Nucleus is not to be used as a creative headline or tagline on any IBM communication.

Integration - staying true to the IBM Brand

Different types of integration

Today, most of the IBM marketing communications are planned and developed as integrated campaigns, not standalone efforts. As a result, campaigns like e-commerce, Global Services or Software each have their own distinct visual language, messaging and recognizable design elements across all disciplines and materials.

While this vertical integration within a campaign is essential to achieving maximum campaign impact and effectiveness, horizontal integration with the IBM Brand is important for maintaining a distinctive, unified voice when talking to the customer in sales collateral.

Vertical and horizontal integration within one brand.

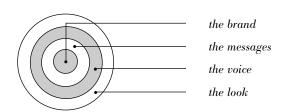
Integrating with the IBM Brand

Sales collateral materials are often used at a critical point in the purchasing cycle when customers evaluate different components of a solution together. Therefore, a typical pocket folder simultaneously contains brochures, case studies and spec sheets for software, hardware and services.

The IBM Sales Collateral Global Brand & Design Principles provide a maximum level of horizontal integration for these instances, while maintaining flexibility within each group. They guarantee that any mix of collateral deliverables will communicate one IBM Company and one IBM Brand through the wealth of different solutions and products.

The essential characteristics that define the IBM Brand form the basis for all collateral. Once these characteristics are clearly identified, the message, voice and look must be developed around and always support this core.

These sales collateral principles were created to guarantee that any mix of collateral deliverables will communicate one IBM Company and one IBM Brand.





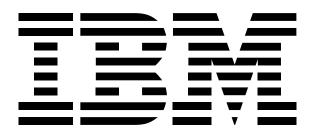
IBM Logo
e-business logo
Typography
IBM Blue

This section examines the elements that affect the look and tone of sales collateral. Design, typography and imagery determine the look. The feeling these elements create together on the page determines the tone.

It's important to recognize that graphics and text should work together to invite the reader's eye to the page. Dense text is less inviting and less likely to be read. Open text and adequate white space is more inviting to the eye and encourages the reader to delve deeper.

The following pages provide examples of correct and incorrect ways to use graphic elements and the IBM Logo. Of course, these are just some of the ways these elements can be used together to create effective collateral materials.

The logo



IBM has one of the world's most recognizable logos. To customers and prospects, the logo is more than merely a signature on ads or brochures. In a glance, it symbolizes all that IBM stands for.

Co-branding

When the IBM Logo is used jointly with another corporate logo, the need to protect the IBM Logo and the brand is critical. This sales collateral design system should not be used for any co-branding materials. Furthermore, the strategy, placement, size and relationship for use of the IBM Logo with any other logo must first be approved by IBM Corporate Identity & Design.

IBM has many co-marketing and alliance partnerships. The Sales Collateral Global Brand & Design Principles are to be used exclusively for IBM-only deliverables.

Correct IBM Logo and logo holding device

The IBM Logo

IBM has one logo, which may appear in either black or white. It should appear as shown here, consistently and without alteration.

On sales collateral covers, the IBM Logo must appear in white, within one of the three logo holding devices shown here.

On back pages, the IBM Logo must appear in black.

The grey logo holding device should only be used when four-color printing is not an option.



Reversed out of IBM Blue



Reversed out of 100% black



Reversed out of 60% black



100% black

The logo holding device may ONLY be used in sales collateral materials. It should not be used on any other marketing communication.

Space around the logo X X X X

When the logo appears on the front cover of a brochure, flyer or other application, no "®" mark is needed.

The sign-off area on the back cover or back pages of collateral materials should always include the logo with the "®" registration mark (or appropriate mark for your country) and the copyright notice, followed by the current year. "© Copyright IBM Corporation 2001."

Minimum size

The minimum size allowed for the IBM Logo is 20 points high (over dimension X as indicated here).

Space around the logo

The IBM Logo should always

e freestanding and separated

from all copy and graphics

x-height. This distance may

be considered the minimum uninterrupted space surrounding the logo.

by a distance equal to its

Misrepresenting the IBM Logo

Avoid the following logo alterations, juxtapositions or combinations:

Never use the IBM Logo in the logo holding device on any color other than IBM Blue or black.





Never add product names or group names to the logo or within the logo holding device.

Never combine or visually unite the logo with the e-business logo or any other logo to create a new lockup.





Never reproduce the logo. Always use the supplied electronic or camera-ready artwork.

Incorrect

Incorrect

Never extend the logo holding device or combine the IBM Logo with another company's logo.



Incorrect



Incorrect

Never distort the logo or retouch the logo into a photograph, chart, diagram or illustration. The logo should always remain as a separate graphic element from the imagery.

e-business logo usage

The e-business logo should appear in red whenever possible. However, when production limits occur, a black version may be used. The e-business logo, developed to indicate to customers that an IBM e-business solution is being discussed, should be used sparingly. Although it should have a prominent position in sales collateral (see **section 2.7** – Collateral formats), its use must be relevant. If the content is not e-business related, using the e-business logo would be misleading to the customer and therefore should be avoided.

e-business usage guidelines have been developed by IBM Corporate Identity and should be referred to for compliance. For more information visit the brand site at: **ibm.com**/marketing/branding

See section 2.7 – Collateral formats, for correct placement and usage within collateral layouts.



Pantone® 032, black or 100M/100Y, black



100% black



Pantone® 032, reverse text or 100M/100Y, reverse text

The e-business logo may be placed on white, black or colored backgrounds.

It may also be placed over imagery. However, maximum contrast should be maintained between the background and the logo.

IBM Sales Collateral Global Brand & Design Principles

Visual identity elements

Typography

Helvetica is the dominant typestyle for collateral. Bodoni is the secondary typestyle for accents. A good typeface helps the reader concentrate on content. It doesn't call attention to itself, but, rather, makes communication faster, easier and more accurate. The ultimate goal is to make typography legible and pleasing to the eye.

Adobe Helvetica and Berthold Bodoni Antiqua are the IBM Brand fonts. They represent the IBM Brand through the clarity of their forms, the balance of their lines and the lucidity of their letters. This achieves optimum legibility. Consistency of type is all part of maintaining a single look and feel for the brand. Helvetica and Bodoni are used in all IBM advertising, direct marketing and collateral.

In collateral, Helvetica is the dominant typestyle. It has been chosen because of its modern and clean edge, significant of the technology solutions IBM offers. Bodoni is used as an accent typestyle to bring a warmth and human element to all IBM deliverables.

Within each sales collateral electronic template, specific style sheets have been created to assist in the design of collateral.

Type usage

Specific point size and leading are predetermined for each collateral format and are discussed in **section 2.7** – Collateral formats. A standard set of typographic style sheets has been included within each Adobe InDesign™ template. Please take extra care when typesetting copy and headlines within collateral. If the customer has difficulty reading the copy, it sends a poor message about the ease of doing business with IBM.

Adobe InDesign contains certain typesetting tools to assist designers. Refer to section 2.8 – Distribution for more information on Adobe InDesign type features.

Adobe InDesign typographic tools

There are three unique typographic tools provided by Adobe InDesign which should be used when creating collateral:

Optical kerning. Headlines and large type callouts should be composed using the optical kerning tool, which visually spaces according to character shape. It is accessed from the *character* drop down menu, under *type* on the menu bar.

IBM Sales Collateral Global Brand & Design Principles

Visual identity elements

Optical margin alignment. For justified text where overhanging punctuation is required, and in callouts where an optically aligned margin is desirable, use optical margin alignment. Select *story* from the *type* menu, and check the box provided.

Multi-line composer. This tool considers a network of break points within a body of text and can optimize earlier lines in the paragraph in order to eliminate any unattractive line breaks later on. It highlights poor word spacing, line breaks and kerning, and offers the best possible solution.

To access the multi-line composer, you must first have the paragraph style floating window active. Select the feature from the sub-menu by clicking on the arrow at top right.

Typographic conventions

Use the following conventions when setting type for IBM collateral material:

Left alignment. For flush left text, the objective is to achieve a strong and clean grid layout, with emphasis on the vertical left-hand edge and a visually random ragged right-hand edge. Paragraph identification and separation is achieved with additional line space between paragraphs.

Tracking and word spacing. The Helvetica typeface used in IBM collateral is designed to be set with a track value of 0 in normal use. Adjacent lines in justified setting should not differ by more than 1 tracking unit. Never adjust the intercharacter space to beyond -10 or +20 as this will tend to impair legibility. Word spacing or tracking should not be adjusted from 0 in flush left text. Headlines and large type callouts can be individually adjusted using the Adobe InDesign tools described above. When reversing type out from a solid color or photograph, it is common to make it slightly bolder and/or more open to aid legibility.

The Bodoni Antiqua typeface is used primarily for large callouts.

Maintain careful visual spacing to achieve an even, tight feel. A baseline tracking of -2 is recommended as a starting point at sizes over 16 pt, aided by Adobe InDesign visual kerning.

Errors in typesetting

Although many of the more common typesetting mistakes can be overcome with Adobe InDesign's tools, the following typographic distractions should also be avoided:

Hyphens. Avoid excessive hyphenation in unjustified typesetting, but hyphens can be used to maintain a rag of no more than 2 picas. The rag should appear random, without shapes such as steps or half-rounds. Product names or proper names should never be hyphenated. A word which is already hyphenated (a compound word) should not be re-hyphenated, nor should the last word of a paragraph.

they all demand flexibility. Most students want education to be convenient

Avoid two-letter hyphenations.

raised on the Internet, the needs of a non-tradithe key is to look at

Do not hyphenate a hyphenated word (a compound word) for a second time.

Do not hyphenate the last word of a para-graph.

Other typographic distractions

mploying standard software transform support process as human resources and fin replacing paper with select unication. The e-business h crue from significantly high

Rivers of white where word spaces fall in a vertical pattern from line to line can be distracting and unattractive.

ive or both - directly to your uents—students, faculty, st mni and others-via intranet nd the World Wide Web.

Visual gaps or holes formed by too much space on either side of dashes, or the wrong kind of dashes, are shown in this example. Proper spacing is to kern out 0.12 of an em space on either side of the en dash.

udents are sophisticated ccustomed to convenience ervice. Increasingly, they me level of service from niversities. This means solated administrative o an integrated, Web

Avoid stepped rags (in a straight line) in flush left (or flush right) setting wherever possible.

setting wnerever possible.

ng students. The key is to g ajor IT EXPENDITURES usiness FRAMEWORKS for HIGHER EDUCATION, the ly. They can scale and be ri

Groups of all caps form ugly patches in the text which draw the reader's attention and detract from legibility.

itment to fundamentally pproach teaching, nistration. It's about ervice to help simplify ocesses, reduce costs evels. And it's about academic environpus by moving to student

Stepped rags (half-round) in flush setting should also be avoided.

erform their jobs in new ays. Armed with fresh insight an make informed decisions at to transform next. This ca

Changes in letter and/or word spacing from line to line disturb the natural flow of text.

Typography samples

The following is a list of the approved typography for all IBM sales collateral:

Helvetica is the dominant typestyle for body copy, large callouts and subheads.

Helvetica

Light *Light Italic*

Regular *Regular Italic*

Bold Italic

Black Black Italic

Helvetica Condensed is used for headers, subject identifiers, subheads and chart information.

Helvetica Cond

Cond Light Cond Light Italic

Cond Regular Cond Regular Italic

Cond Bold Italic

Bodoni is a secondary typestyle used in brochure body copy, large callouts in brochures and testimonial quotes in case studies.

Bodoni

Light *Light Italic*

Regular Italic

1.5

Visual identity elements

IBM Blue

IBM Blue is used in the logo holding device on the covers of sales collateral brochures and other materials. Wherever possible, IBM Blue should be printed using Pantone® 2718. When this printing method is unavailable, a four-color process breakdown has been determined to give consistency with the Pantone colors and throughout all printed materials.

The colors shown below demonstrate the usage and breakdown of IBM Blue. Please note: the approved process breakdown for IBM Blue is different from the Pantone process breakdown. Always use the approved color breakdown below:

The approved IBM Blue is:

75% Cyan 43% Magenta

01

Pantone® 2718













Pantone® 2718

75% Cyan 43% Magenta



1.6 Tone and manner

The voice of IBM

Copy and content

The importance of imagery

IBM Sales Collateral Global Brand & Design Principles

Tone and manner

While sales collateral takes many forms, from printed brochures to white papers and even CD-ROMs, all of these formats share common goals:

Deliver clear, concise information about IBM products, services and solutions that helps the customer or prospect make an informed and sound decision.

Explain the technical specifications of a product, service or solution in the context of tangible customer benefits.

Prove that technology is not an end in itself, but a tool to help the customer build and run a stronger, more competitive business.

Build deeper relationships with existing customers and move prospective customers further along the sales cycle to create long-term relationships.

The voice of IBM

Collateral materials are generated from the combination of two elements: images and copy. This combination forms a deliverable which can be judged against the Brand Intent. As the Brand Intent states,

IBM has imagination and expertise in business and technology to see and seize opportunities for your business advantage.

When collateral materials are created, the individual components can be judged against a series of aspirational qualities that also contribute to the brand.

These attributes, the look, tone and feel of the IBM Brand are always:

Human Relevant

Approachable Empathic to customers

Witty* Informative

Contemporary Trustworthy

^{*} A "witty" tone may be inappropriate in certain sales collateral deliverables, such as specification sheets, case studies and white papers where the information should be delivered in a clear, informative manner.

1.6

Tone and manner

Copy and content

Concise, benefit-driven copy is critical to collateral that sells. Remember, customers have requested this information. So they expect content – the features and benefits that can help them overcome their business challenges.

Sales collateral copy should convey the sense that IBM is approachable and empathic to the customer's business needs and problems. It takes a conversational tone, using simple, direct sentences, and avoids jargon, overwritten prose and "fluff."

Use simple, direct sentences and avoid jargon, overwritten prose and "fluff."

Ultimately, collateral copy demonstrates that IBM understands what customers are trying to achieve, and that we respect them as business professionals and that we deliver solutions and expertise that will benefit their company.

Titles, headlines and subheads

Copywriters often hear "No one reads anymore." But it might be more appropriate to say "No one has time to read anymore." Headlines should be direct and to the point. Tell the customer what the product or service is, and what the benefits are. Avoid vague headlines such as, "Right for Today, Ready for Tomorrow" or "The Company You Know and the Products You Need."

Subheads should be used often to break up copy and allow readers to scan the page and find the information they are looking for. Subheads should compel the customer to look deeper.

Use subheads to break up copy and allow the reader to "scan" the page for the information they are looking for.

Tone and manner

The importance of imagery

First impressions count. What customers notice first are images. Choosing the proper image says something about how we perceive our products and services and how we perceive the customer.

Stock vs. traditional photography:

The principles for producing and using imagery apply for both stock and traditional photography. It's better to use no images than ones that convey no information or are used as "fillers."

The customer will never know where an image came from, only what it savs about IBM. **Informational photography.** Product shots and screen captures are important in creating successful, informative collateral because appearance is often a deciding factor in the purchase decision. While shooting the product in an interesting or unexpected setting can add to its appeal, poor quality or a distorted image can work against even the most compelling copy and specifications.

Screen captures may be used to demonstrate the breadth or interactive quality of a product or software. Although they are difficult to create, they can be very effective in demonstrating a particular software or interface. A screen shot can only be captured at a low resolution for viewing on a monitor. Therefore, when enlarging a screen shot for printing, the information gets blurry and illegible. Avoid using screen captures as large main visuals in brochures.

Tone and manner

Promotional or conceptual photography. Complex solutions or ideas that don't directly relate to a particular product may require promotional – or conceptual – photography. While conceptual photography can help explain complicated messages, it is often overdone or forced. Avoid using images that represent clichés, i.e., an image of a lock to show security. Also avoid irrelevant image collages, as the customer won't spend the time deciphering the messages within them. It's also possible to include photography from current IBM advertising campaigns. This is particularly effective because it lets you leverage the look and feel that may have led the prospective customer to consider an IBM product or service in the first place. (Note: always confirm usage rights before using campaign photography.)

Photographs of people can be used as a way to "humanize" technology. Show that we understand our customers by portraying them in a positive and engaging manner. These photographs can reinforce the overall strategy – that IBM products and services solve real business problems for real business people.

Before deciding to use photographs of people, it's important to understand the target audience. People shots are better suited for issue- or concept-related materials, like brochures and flyers, rather than spec sheets and reference guides. Also, outdated or stereotypical representations of people or business environments can have a negative impact on the customer's perception of the product or service. Keep in mind whether or not the piece will be distributed worldwide. What's intriguing in one part of the world may be misunderstood or offensive in another.

Charts and diagrams. Charts and diagrams are useful for conveying critical information in a simple and direct manner. Charts should be clean and simple. Layout, font and rule specifications have been predetermined to ensure legibility (see **section 2.7** – Specification sheets).

Diagrams can also be used to convey complex solutions or concepts. Always keep designs simple and legible. Screen captures from presentation documents are often illegible in printed formats. Avoid superfluous designs, colors and clip art.

Whether you are showing product, people or conceptual photography, the key to all photography is relevance.

Make the image say something important about the piece and not just take up space.

1.6

Tone and manner

Imagery samples - informational photography

The following are examples of good and bad imagery. These shots are selected for demonstration purposes only. They should not be used as a style or content reference.

Correct

00110

Product:

The image on the left is strong and contemporary. The arrangement and angle is interesting and engaging.



Incorrect

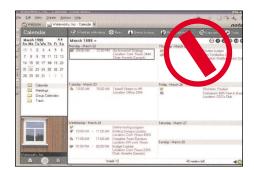
Product:

The image on the right is over-produced with color and clutter, making it difficult to recognize the product.

Screen capture:

The image on the left is clear, simple and readable.





Screen capture:

The image on the right is blurry and illegible.

Tone and manner

Imagery samples - promotional or conceptual

The following are examples of good and bad imagery. These shots are selected for demonstration purposes only. They should not be used as a style or content reference.

Correct

Incorrect

Time concept:

The image on the left is dramatic and invigorating. It demonstrates the concept of time in an interesting and contemporary manner without being threatening.



iiicoirect

Time concept:

The image on the right is boring and tired. The concept of a watch to show time is a cliché and should be avoided in this manner.

Office environment:

The image on the left is contemporary and relevant. It shows a modern IT professional in an actual back office.





Office environment:

The image on the right is negative and threatening and staged. It positions IBM in an uncertain and dark light.



The image on the left is strong, personal, approachable and realistic.





People:

The image on the right is posed, the subjects look unrealistic, and the environment is unengaging.